

Figure 1: Main Menu

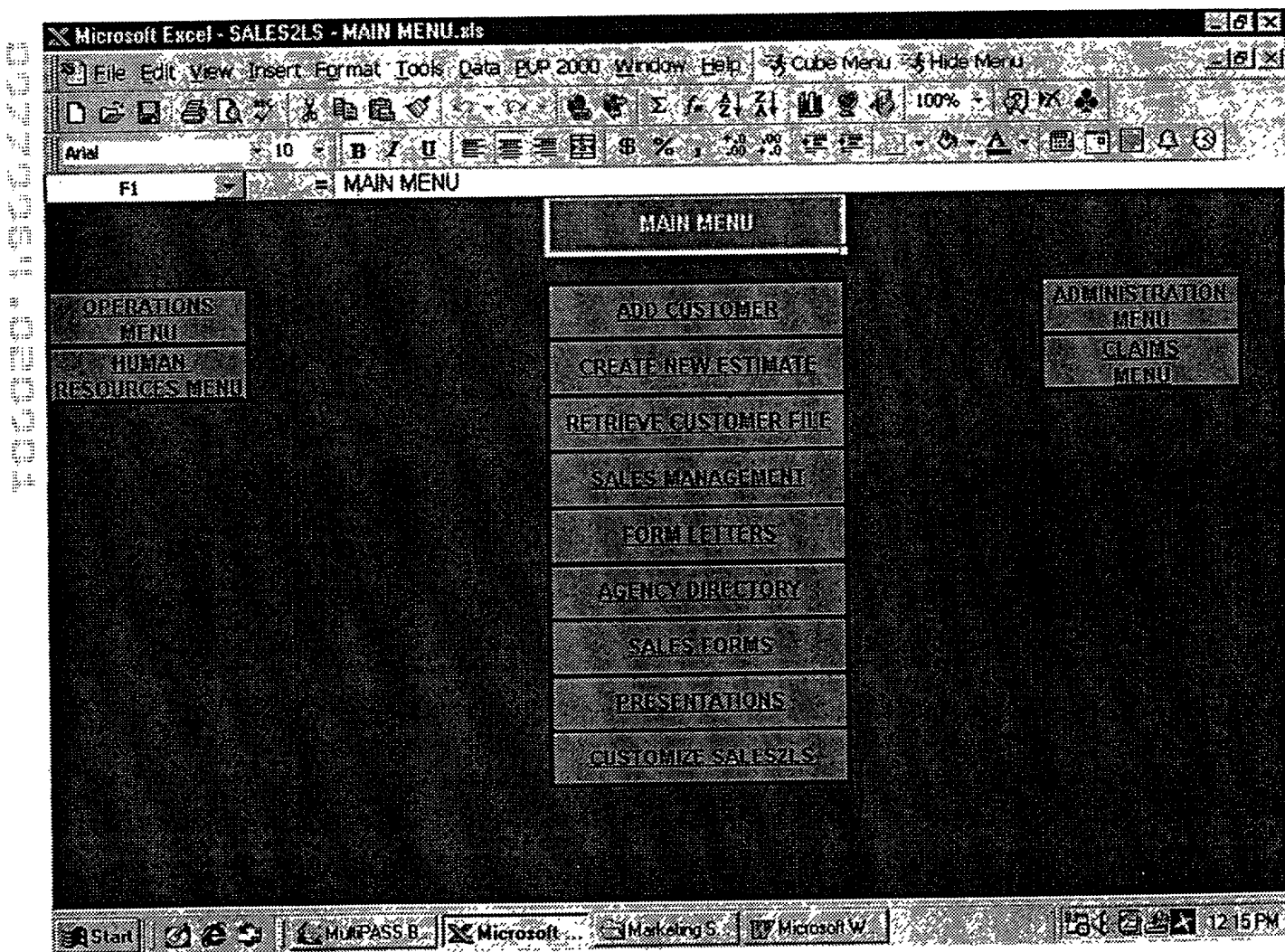


Figure 2: Form Letters sub-menu

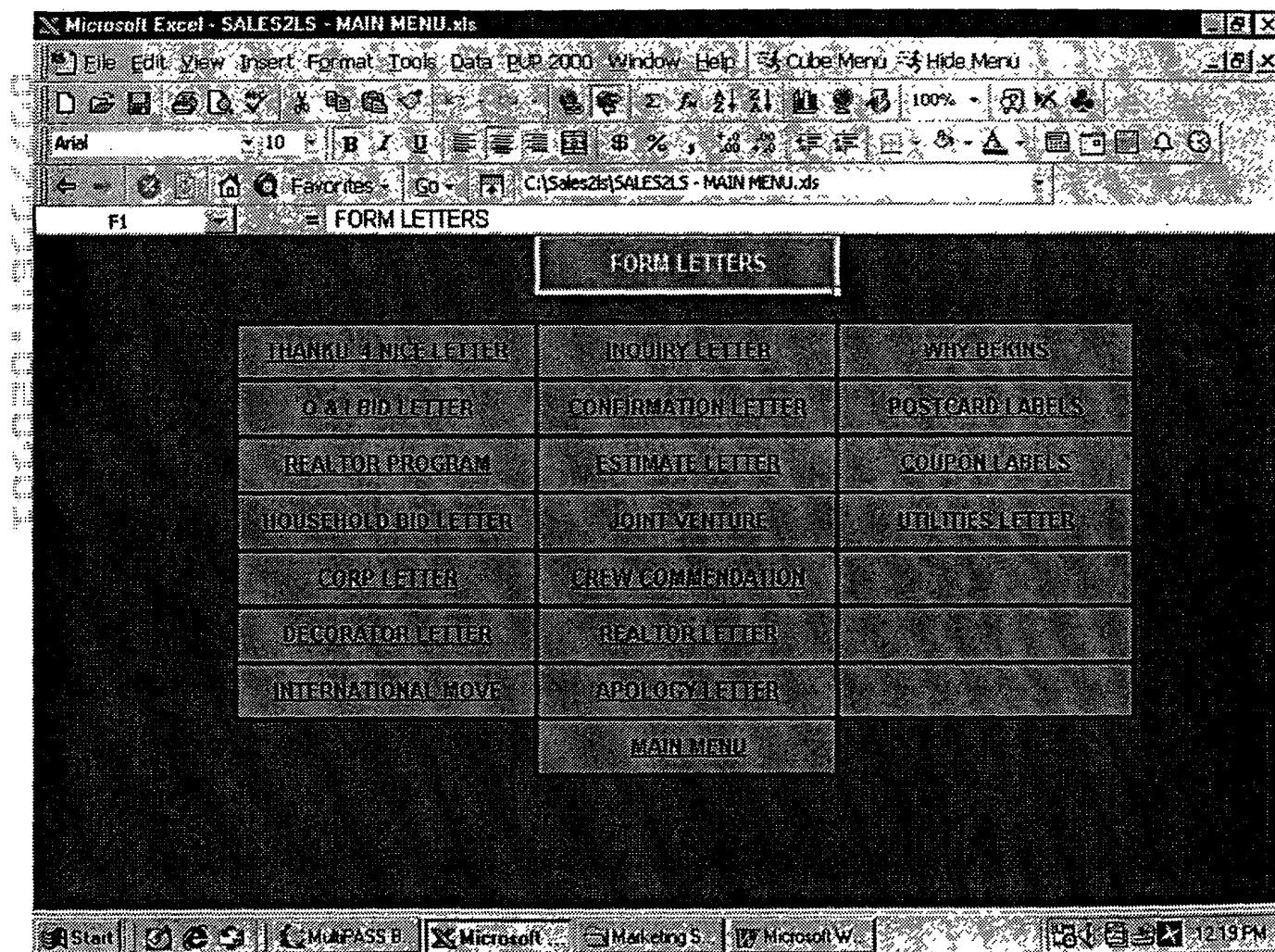


Figure 3: Customer Database
input-screen

Microsoft Access

File Edit View Insert Format Records Tools Window Help

Go C:\Sales26\400M Database.mdb

X400M CustomerDatabase

| | | | | | |
|--------------|----------------|----------------|-------------|------------------|----------------|
| DATE OF CALL | 2/5/98 0:00 | APPT DATE TIME | 12:00:00 PM | SALESPERSON | RON |
| CUSTOMER | JOE CUSTOMER | TAKEN BY | LISA | CONSIGNEE | SAME |
| ADDRESS | 1234 ELM | SOURCE | YP | DEST ADDRESS | W/A |
| CITY, ST | SCOTTSDALE | DATE SENT | 2/6/98 0:00 | DEST CITY, ST | CHICAGO |
| STATE | AZ | | | DEST STATE | IL |
| ZIP | 65209 | | | DEST ZIP | 58900 |
| COUNTY | MARICOPA | | | DEST COUNTY | COOK |
| PHONE | (602) 544-1234 | | | DEST PHONE | (502) 355-1234 |
| ADDL' PHO | (602) 555-2345 | | | DEST ADDL' PHONE | (502) 233-2345 |

Record 1 of 19

Form View

Start MultiPAS Microsoft Makein Microsoft Micros...

12:38 PM

Figure 4: Customer File Folder

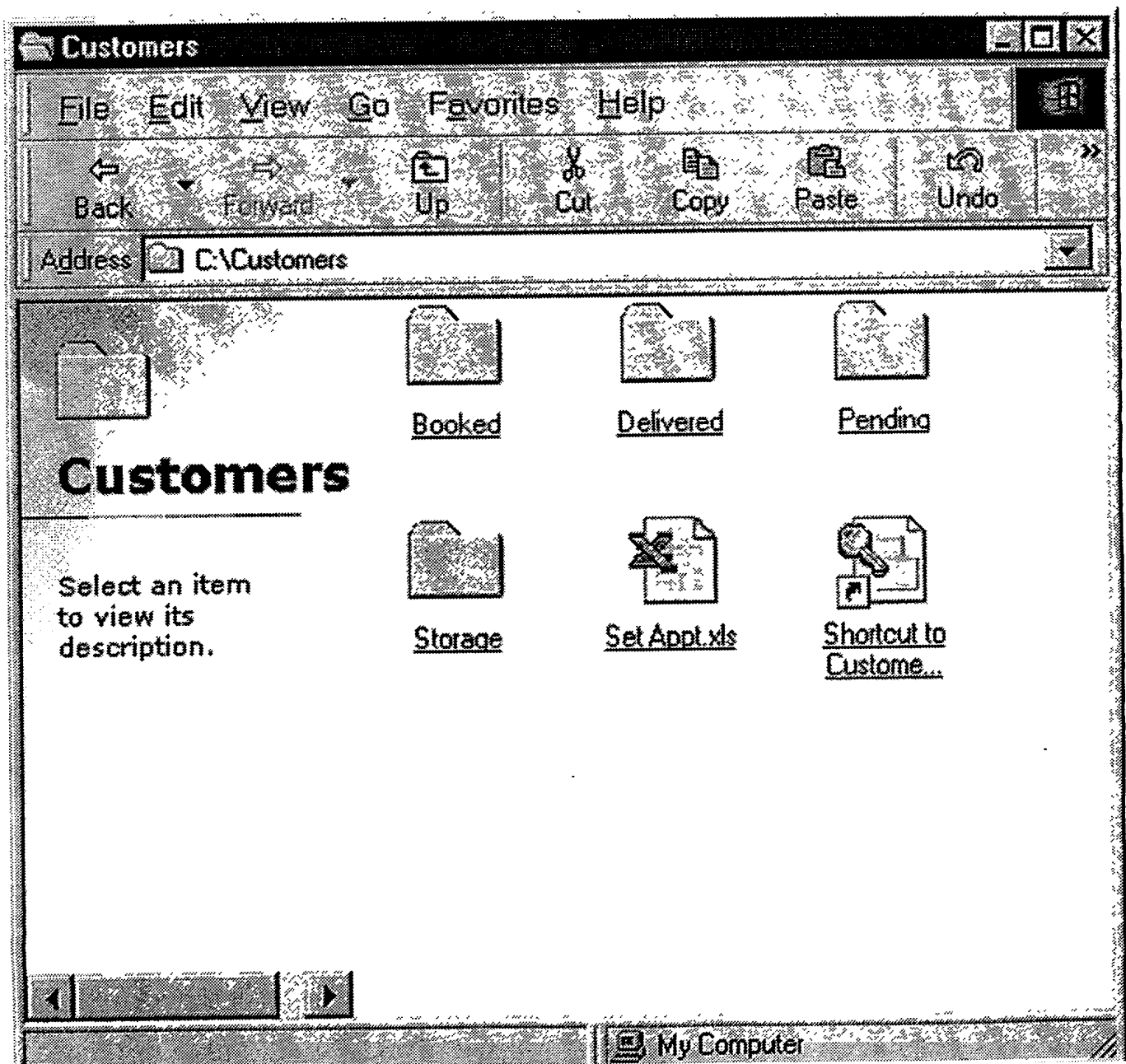


Figure 5 Find Files feature

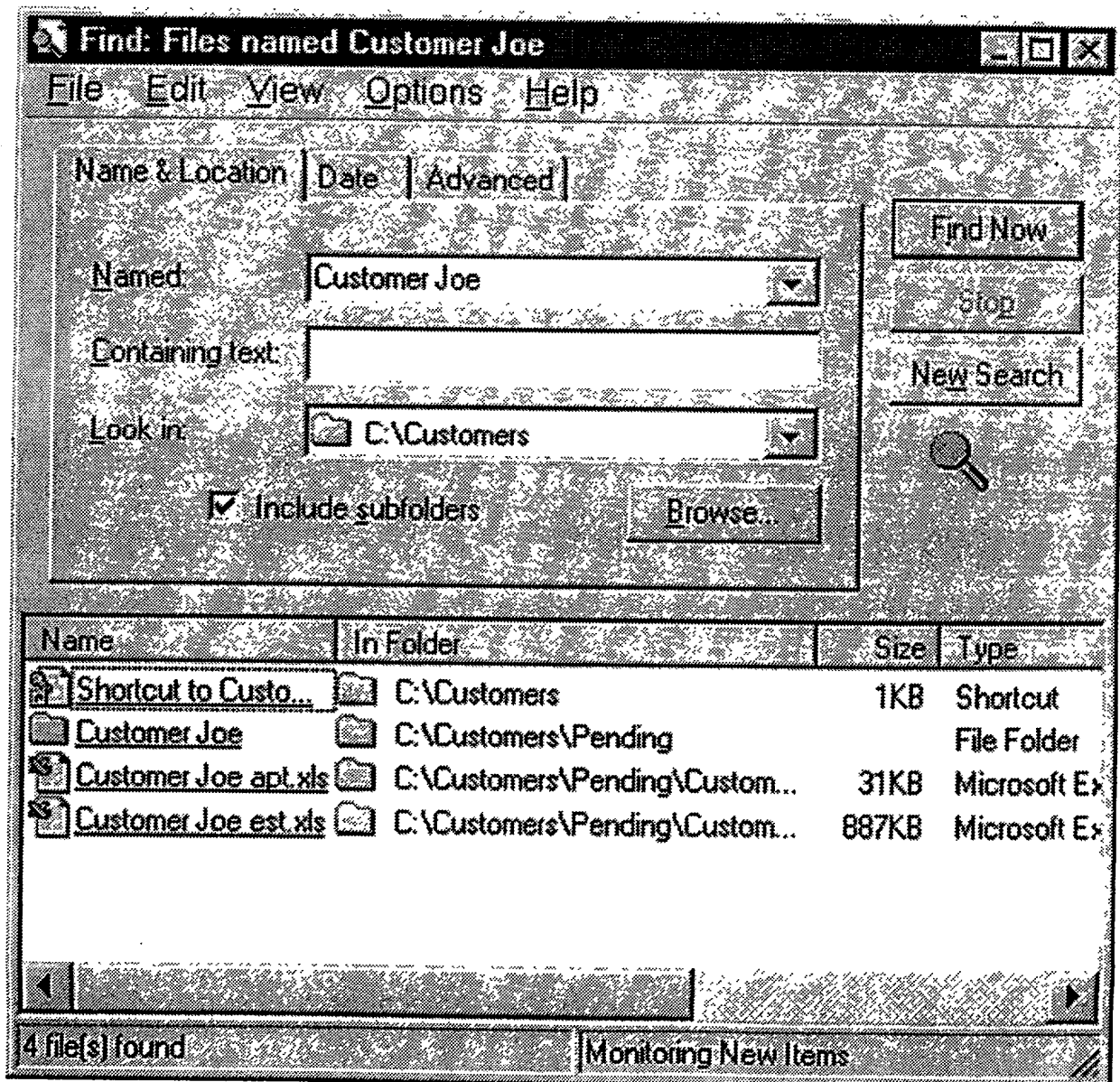


Figure 6 Appointment Card

Microsoft Excel - Customer Joe apt.xls

File Edit View Insert Format Tools Data POP 2000 Window Help Cube Menu Hide Menu

Arial 12 B I U

C3 =CUST DATAIG2

Appointment / Cover Sheet

Lead Source YP

Salesperson RON Appt Set by LISA Appt date 08-Feb-98 Time 12:00 PM

FROM: Name JOE CUSTOMER TO: D Name SAME

Address 1234 ELM D Address WIA

CITY SCOTTSDALE D CITY CHICAGO

ST AZ ZIP 65209 D ST IL D ZIP 58900

Phone (602) 544-1234 D Phone (502) 355-1234

Phone 2 (602) 555-2345 D Phone 2 (502) 233-2345

| | | | | |
|--------------|------------------|------------------|------------------|---------------------|
| Local _____ | Intrastate _____ | Interstate _____ | Storage _____ | International _____ |
| House _____ | Condo _____ | Apartment _____ | Mobile Hm _____ | Mini Stg _____ |
| Bedrms _____ | Liv. Room _____ | Din. Room _____ | Fam Rm _____ | Kitchen _____ |
| Patio _____ | Garage _____ | Storage _____ | Other _____ | Describe _____ |
| PBO _____ | Driver Pk _____ | Partial Pk _____ | Carrier Pk _____ | Unpacking _____ |

COMMENTS: Joe is getting three estimates for corp.

Contact _____ C Phone _____

Contact at PAI ☐ C Address _____

CUST DATA SET APPT / CALL LOG /

Start 10:04 PM

Figure 7: Messages directory

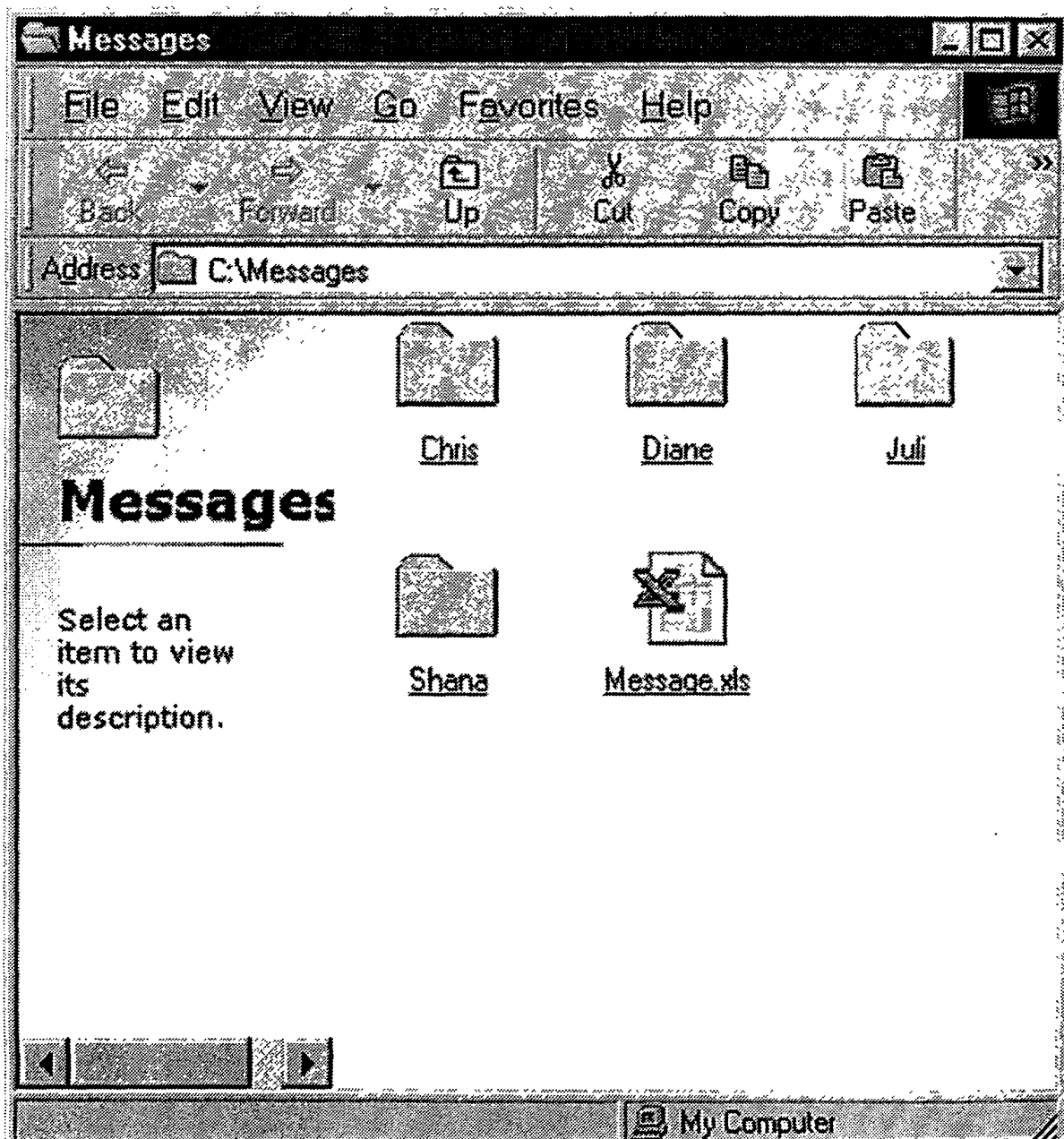


Figure 8 Estimate worksheet

Microsoft Excel - Customer Joe est.xls [Read-Only]

File Edit View Insert Format Tools Data POP 2000 Window Help Cube Menu Hide Menu

Times New Roman 8 B I U

B8 =CUST DATA1A2

CLIENT INFORMATION CARD

| | | |
|------------------------|------------------|--------------------------|
| MOVE TYPE _____ | CARTAGE _____ | DATE SENT TO SALES _____ |
| TODAYS DATE 02/06/2000 | OPERATOR _____ | APPT DATE & TIME _____ |
| WAYBILL _____ | MASTER VIB _____ | SALESPERSON # _____ |
| REG AGT _____ | BOOK AGT _____ | ORIG AGT _____ |
| | | DEST. AGT _____ |

| | |
|---|--|
| <h4 style="text-align: center;">ORIGIN INFO</h4> <p>CUSTOMER <u>JOE CUSTOMER</u></p> <p>ADDRESS <u>1234 ELM</u></p> <p>CITY <u>SCOTTSDALE</u></p> <p>STATE <u>AZ</u></p> <p>ZIP <u>65209</u> ITEM 170 0.70</p> <p>COUNTY <u>MARICOPA</u></p> <p>PHONE <u>(602) 544-1234</u></p> <p>ADDL PHONE <u>(602) 555-2345</u></p> <p>SERVICE CODE <u>28</u> COST SCHED. <u>C</u></p> | <h4 style="text-align: center;">DESTINATION INFO</h4> <p>CONSIGNEE <u>JOE CUSTOMER</u></p> <p>ADDRESS <u>W/A</u></p> <p>CITY <u>CHICAGO</u></p> <p>STATE <u>IL</u></p> <p>ZIP <u>58900</u> ITEM 170 4.50</p> <p>COUNTY <u>COOK</u></p> <p>PHONE <u>(502) 355-1234</u></p> <p>ADDL PHONE <u>(502) 233-2345</u></p> <p>SERVICE CODE <u>252</u> COST SCHED. <u>D</u></p> |
|---|--|

| | |
|---|---|
| <h4 style="text-align: center;">SHIPMENT INFO</h4> <p>MILES <u>1751</u> BL or LH DISC. <u>61%</u></p> <p>EST HHG WEIGHT <u>8000</u> ACC. DISC. <u>61%</u></p> <p>CUBIC FT <u>1143</u> ACT. WEIGHT <u>8000</u></p> <p>AUTO DESCRIPTION _____</p> <p>AUTO WEIGHT _____ TOTAL WEIGHT <u>8000</u></p> | <h4 style="text-align: center;">DESTINATION CONTACT INFO</h4> <p>CONTACT _____</p> <p>ADDRESS _____</p> <p>CITY _____</p> <p>STATE _____</p> <p>ZIP _____</p> |
|---|---|

1:15 PM

Figure 9: Estimate Menu

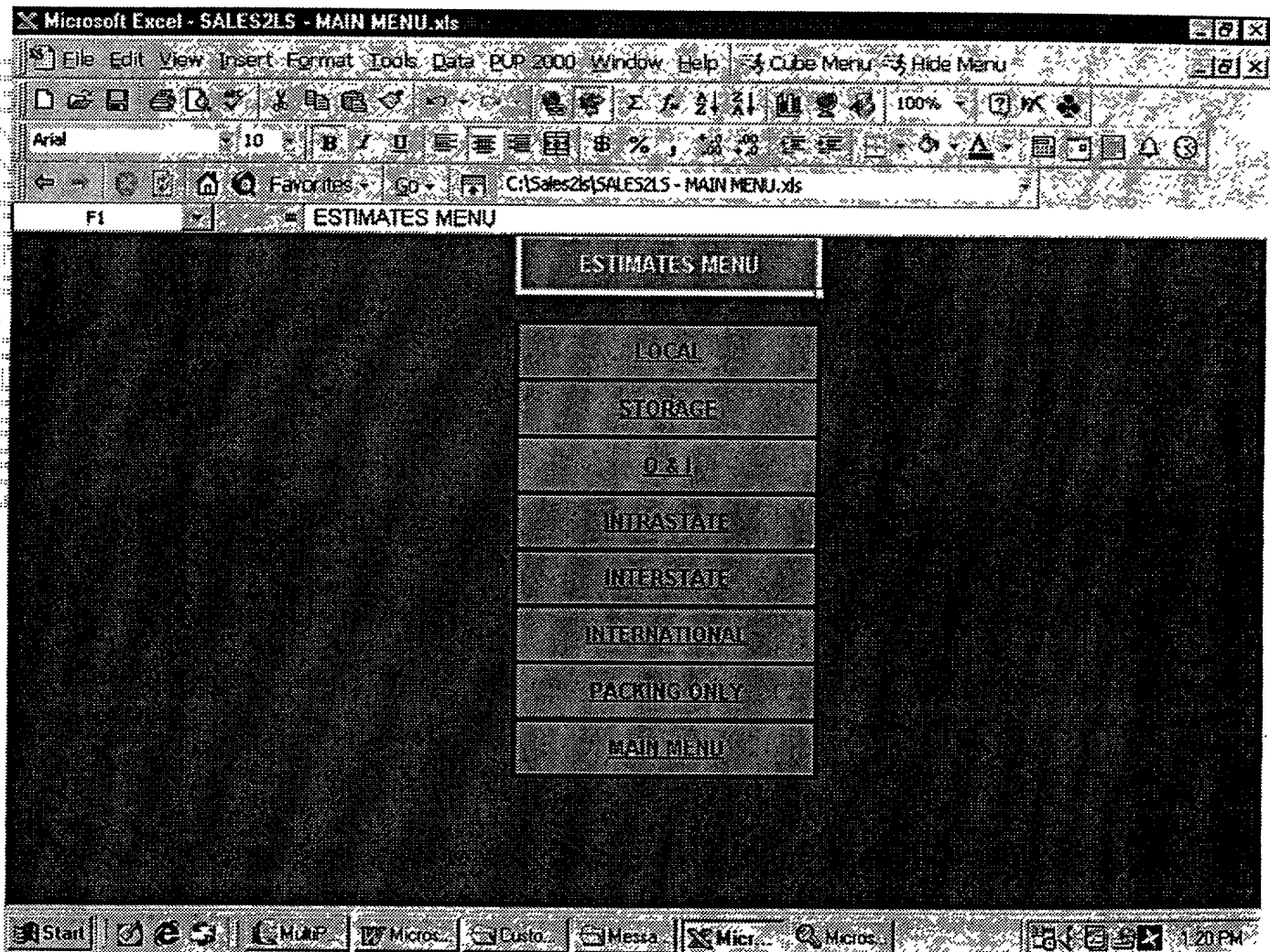


Figure 10: Cube Sheet

[illegible]

Figure 11: Packing Worksheet

Microsoft Excel - 400M2000vsl.xls

File Edit View Insert Format Tools Data POP 2000 Window Help Cube Menu Hide Menu

Counter 10 100%

B6 =ESTIMATEIH54

AMENDED ☐
 PACKING WORKSHEET ☐
 ACKNOWLEDGEMENT ☐

BEKINS

CUSTOMER NAME: JOE CUSTOMER
 BILL OF LADING NUMBER
 UNPACK Y/N: N

| CARTON TYPE | NO OF UNITS PACKED BY | | MATERIAL CHARGES | | | LABOR CHARGES | | UNPACKING | |
|---------------|-----------------------|------|------------------|---------|--------|---------------|---------|-----------|--------|
| | BEKINS | CUST | RATE | C.P. | P.B.O. | RATE | PACK | RATE | UNPACK |
| DISHPACK | 12 | | 30.45 | 365.40 | | 38.95 | 467.40 | | |
| CTN. 1.5 | 17 | | 6.45 | 109.65 | | 10.00 | 170.00 | | |
| CTN. 3 | 14 | | 9.30 | 130.20 | | 15.70 | 219.80 | | |
| CTN. 4.5 | 9 | | 11.20 | 100.80 | | 19.05 | 171.45 | | |
| CTN. 6 | 6 | | 12.85 | 77.10 | | 21.85 | 131.10 | | |
| CTN. 6.5 | | | 13.80 | | | 25.85 | | | |
| WARDROBE | 12 | | 23.85 | 286.20 | | 11.45 | 137.40 | | |
| CRIB MATT | | | 8.80 | | | 8.95 | | | |
| TWIN MATT | 2 | | 15.75 | 31.50 | | 10.95 | 21.90 | | |
| FULL MATT | | | 19.50 | | | 10.95 | | | |
| KING/QUEEN | 3 | | 32.20 | 96.60 | | 17.25 | 51.75 | | |
| KING SPLIT | 2 | | 22.10 | 44.20 | | 10.95 | 21.90 | | |
| MIRROR | 7 | | 24.50 | 171.50 | | 35.70 | 249.90 | | |
| NO. BOXES | 64 | | | | | | | | |
| CRATING, CUBE | 6.00 | | TOTAL | 1413.15 | | TOTAL | 1642.60 | TOTAL | |
| CRATING RATE | 16.00 | | | | | | | | |
| CRATING \$'s | | | NET TOTAL | 551.12 | | NET TOTAL | \$40.61 | NET TOTAL | |

PACKING INSTRUCTIONS:

APPT CARD / CUBE SHEET / PACKING / PRICING / ESTIMATE / PRICE GRID

Start MultiPASS Background Microsoft Word - Patent a Microsoft Excel - 400 7:47 AM

Figure 12 Pricing Worksheet

Microsoft Excel - 400M2000vst.xls

File Edit View Insert Format Tools Data BUP 2000 Window Help Cube Menu Hide Menu

Courier New

D19 = UNITS

AMENDED
PRICING WORKSHEET
ACKNOWLEDGEMENT

BEKINS

TARIFF 400M
SECTION 1 Customer JOE CUSTOMER
Miles 1751 Est. Ref No.

| | | | | |
|---------------------|------|----------|-----------------------|-------|
| TOTAL CUBE HH | 1763 | # 7 lbs. | # TOTAL HH ITEM (HH) | 12341 |
| TOTAL CUBE AUTO | | # 5 lbs. | # TOTAL POUNDS AUTO | |
| TOTAL CUBE BULKY | | # Lb Ft | # TOTAL B BULKY OTHER | |
| TOTAL SHIPMENT CUBE | 1763 | | # TOTAL WEIGHT | 12341 |

| | | | | | |
|-----------------------------|--------|--------------------|------------------|----------|---------|
| RATING WT. | 123.41 | | | GROSS | NET |
| BASE CHG | 13120 | RATE PH | # TOTAL LINEHAUL | 13120.00 | 5116.80 |
| ADDITIONAL TRANS. AT ORIGIN | 0.70 | # RATE = AT COR. | | 86.39 | 33.69 |
| ADDITIONAL TRANS. AT DEST. | 4.50 | # RATE = ATC DEST. | | 555.35 | 216.58 |
| IMEX CHARGES RATE WT. | | # RATE = TOTAL WC | | | |
| FUEL SURCHARGE 3% | | RATE | | 393.60 | 153.50 |
| TOTAL TRANSPORTATION CHARGE | | | | 14155.33 | 5520.58 |

| | | | | | |
|------------------------------|-------|---------|---------|-----------------|---------------|
| ORIGIN/DEST CHARGES | UNITS | RATE | GROSS | ORIGIN SERVICES | DEST SERVICES |
| TOTAL MATERIAL CHARGE | 84 | BY UNIT | 1413.15 | 551.13 | |
| TOTAL PACKING LABOR CHARGE | 84 | BY UNIT | 1642.60 | 640.61 | |
| TOTAL UNPACKING LABOR CHARGE | | BY UNIT | | | |
| BULKY HANDLING AUTO | | 161.35 | | | |
| BULKY | | | | | |
| BULKY | | | | | |

APPT CARD / CUBE SHEET / PACKING / PRICING / ESTIMATE / PRICE GRID

Start

Microsoft Word - Patent a

Microsoft Excel - 400

7:57 AM

Figure 13: Auto presentation

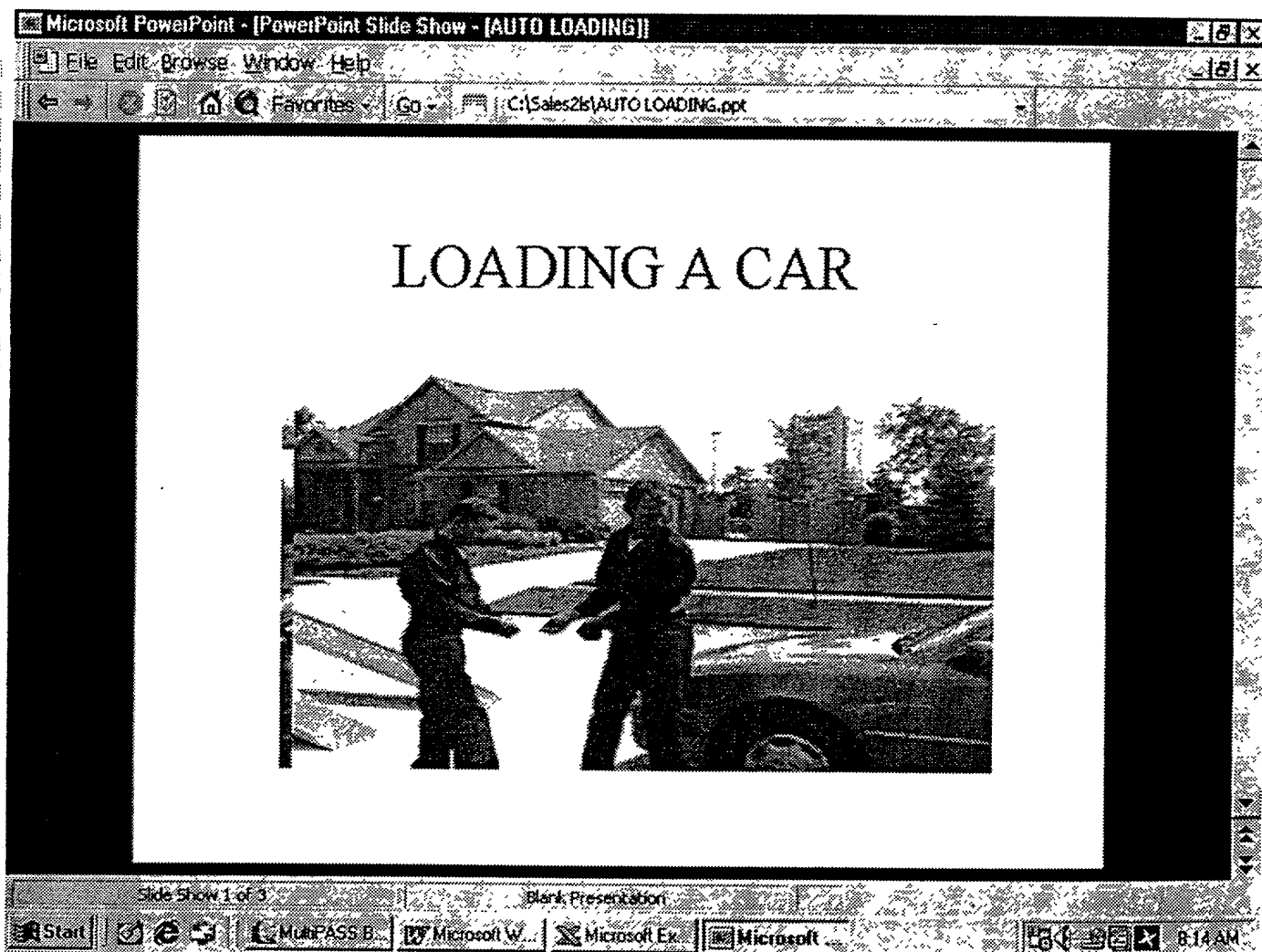


Figure 14. Order For Service
(Estimate tab)

| Microsoft Excel - 400M2000vs1.xls | | | | | | | | | |
|---|---------------------|-----------------------|------------|------------|---|-----|--|--|--|
| File Edit View Insert Format Tools Data BLP 2000 Window Help | | | | | | | | | |
| Courier 10 B U 119% | | | | | | | | | |
| ESTIMATE =APPT CARD1B8 | | | | | | | | | |
| INTERSTATE ORDER FOR SERVICE | | | | | <div style="text-align: center; font-size: 2em; font-weight: bold;">BEKINS</div> | | | | |
| (602) 555-2345 | | | | | B/L REF NO 665544 | | | | |
| (602) 544-1234 | | | | | REG. OFF. 334 | | | | |
| JOE CUSTOMER | | | | | BAPO NO. COD | | | | |
| 1234 ELM | | | | | W/A | | | | |
| SCOTTSDALE | | | | | CHICAGO | | | | |
| MARICOPA county AZ 65209 | | | | | COOK county IL 58900 | | | | |
| ORIGIN INFO | | | | | DEST INFO | | | | |
| | | | | | Shippers Contact: JOES FRIEND 323/444-5678 | | | | |
| <input checked="" type="checkbox"/> COD <input type="checkbox"/> CORP <input type="checkbox"/> DOD <input type="checkbox"/> GOV <input type="checkbox"/> EXCLUSIVE USE <input checked="" type="checkbox"/> BULKY ARTICLE <small>BULKY CHARGE FIELDS</small> | | | | | | | | | |
| RATING WT. | CU. FT. | MILES | TARIFF | PROVISO | DEST AGENT | 341 | | | |
| 12341 | 1763 | 1751 | 400H | 1 | BOYER-ROSENE M & S 847/593-8700 | | | | |
| PACK DATE | AGREED PICKUP DATES | AGREED DELIVERY DATES | | | 2512 S. CLEARBROOK DR. | | | | |
| 03/02/2000 | 03/03/2000 | 03/03/2000 | 03/03/2000 | 03/11/2000 | CHICAGO IL 60005-4694 | | | | |
| QUALIFIES FOR GUARANTEED P/U & DELIVERY <input checked="" type="checkbox"/> YES | | | | | | | | | |
| FAIR <small>UNLESS THE SHIPPER EXPRESSLY RELEASES THE SHIPMENT TO A VALUE OF 40 CENTS PER POUND PER ARTICLE, THE CARRIER'S LIABILITY FOR LOSS AND DAMAGE SHALL BE EITHER THE LUMP SUM VALUE DECLARED BY THE SHIPPER OR AN AMOUNT EQUAL TO \$1.25 FOR EACH POUND OF RATED WEIGHT IN THE SHIPMENT, WHICHEVER IS GREATER. THE SHIPMENT WILL BE SUBJECT TO THE RULES AND CONDITIONS OF THE CARRIER'S TARIFF. SHIPPER HEREBY RELEASES THE ENTIRE SHIPMENT TO A VALUE NOT EXCEEDING</small> | | | | | THE PRICE SHOWN BELOW AS GUARANTEED PRICE IS THE TOTAL AMOUNT YOU WILL PAY | | | | |
| \$ 3.65 /lb. or \$ 45,000 Total Valuation | | | | | TRANSPORTATION CHARGE 5520.58 | | | | |
| \$ 450 /\$100 Value \$ 0.84 /Valuation= \$ 380 | | | | | ORIGIN SERVICES 1415.27 | | | | |
| | | | | | DESTINATION SERVICES | | | | |
| | | | | | VALUATION CHARGE 380.00 | | | | |
| | | | | | <div style="border: 1px solid black; padding: 2px;"> GUARANTEED PRICE </div> | | | | |
| <small>NOTE: THE SHIPPER IS SHARING THE FIRST WEIGHT IN THE SPACE ABOVE, IN THE EVENT OF A SHORTAGE, EITHER HIS DECLARATION OF THE ACTUAL VALUE OR</small> | | | | | | | | | |
| <div style="display: flex; justify-content: space-between;"> APPT CARD / CUBE SHEET / PACKING / PRICING ESTIMATE / PRICE GRID </div> | | | | | | | | | |
| <div style="display: flex; justify-content: space-between;"> Start Microsoft W. Microsoft Po. 8:34 AM </div> | | | | | | | | | |

Figure 15: Fujitsu Mini-Notebook

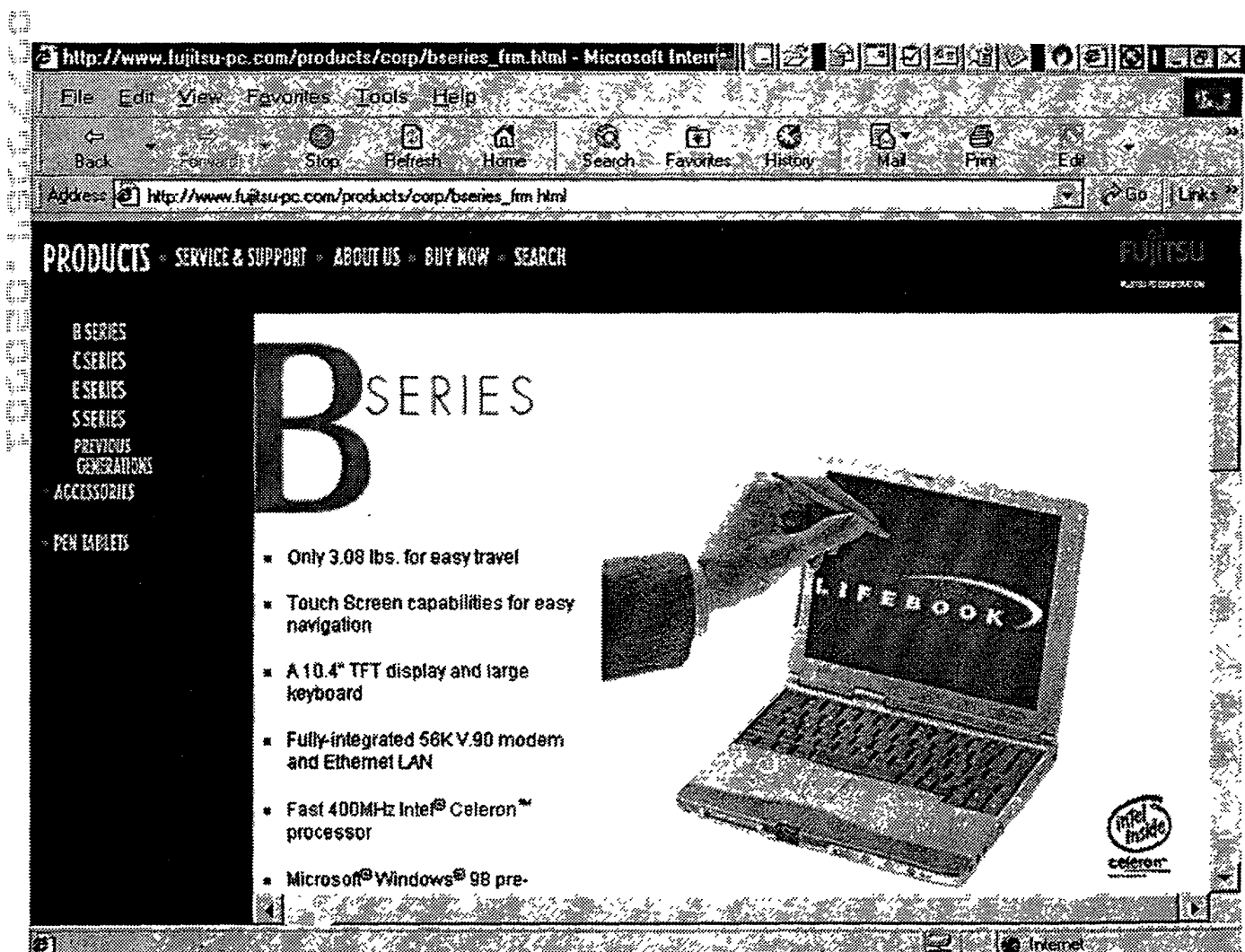
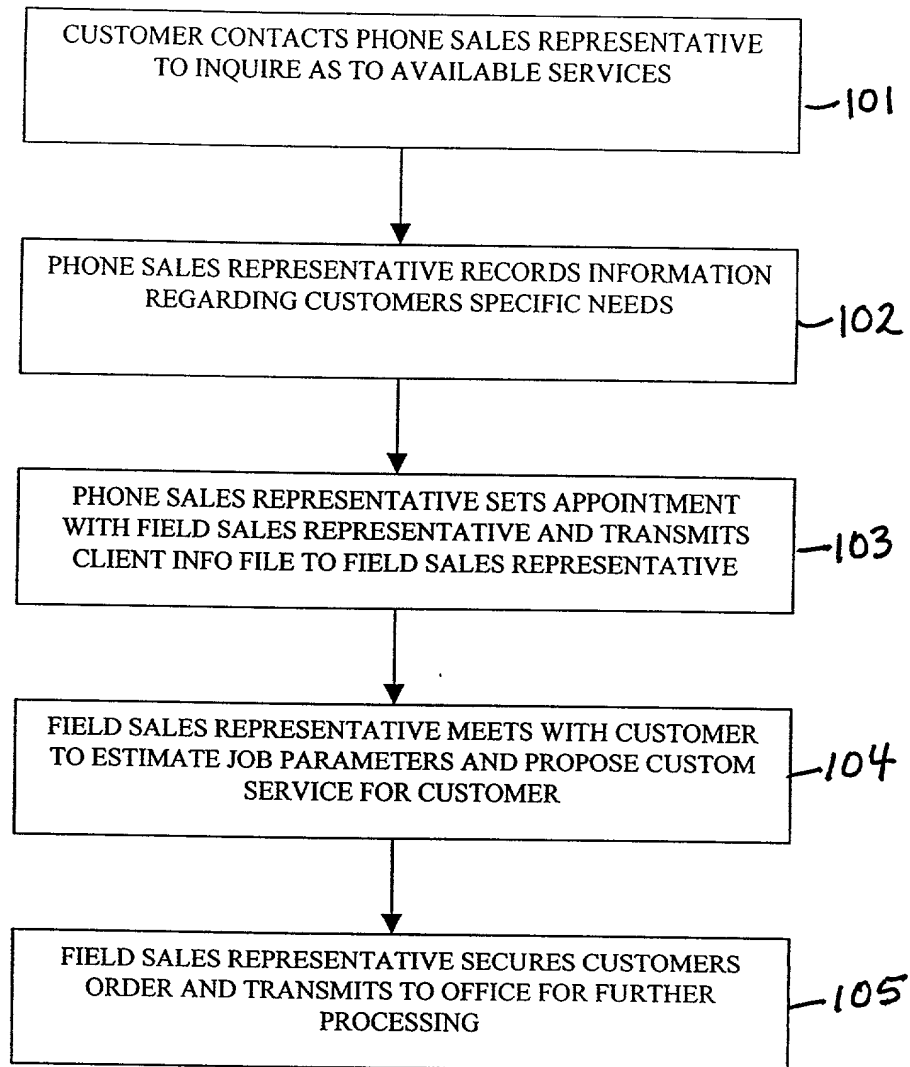


Figure 16 Information Flow Diagram



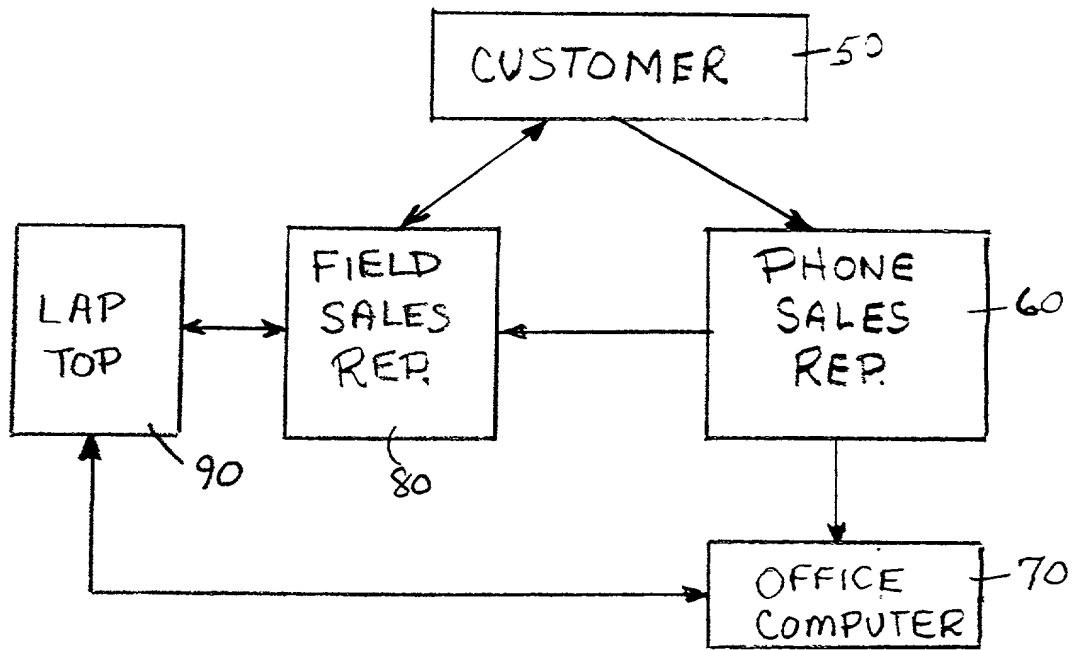


Figure 17